



STATE OF CALIFORNIA
TAX FORMS DEVELOPMENT AND DISTRIBUTION
FRANCHISE TAX BOARD
PO BOX 1468
SACRAMENTO CA 95812-1468

AGREEMENT TO COMPLY WITH FTB PUB. 1098

For computerized tax processors, tax software developers, commercial printers and others who develop tax forms in a scannable format and substitute copies of official California Franchise Tax Board tax forms.

I am a representative of _____
and am authorized to agree to and answer the following on behalf of the above named company. NAME OF COMPANY

Our company will (check all applicable boxes):

- ☐ Develop scannable and/or substitute tax forms using our tax software programs. We plan to develop the following scannable forms: ☐ Form 540 ☐ Form 540A;
- ☐ Develop tax software programs to be used with scannable and/or substitute tax forms developed by _____
(provide company name);
- ☐ Develop scannable and/or substitute tax forms for other companies to use with their tax software programs. We plan to develop the following scannable forms: ☐ Form 540 ☐ Form 540A;
- ☐ Develop Schedule K-1 (565) using our tax software programs; and
- ☐ Reproduce official forms provided by the Franchise Tax Board.

Our company agrees to comply with FTB Pub. 1098, Guidelines for the Development and Use of Substitute, Scannable and Reproduced Tax Forms, published by the Franchise Tax Board.

Specifically, our company agrees to:

1. Refrain from requesting approval of scannable and/or substitute tax forms based on preliminary versions of our forms, or using preliminary versions of our forms to prepare returns for filing with the Franchise Tax Board, or distributing preliminary versions of our forms to the public;
2. Submit to the Franchise Tax Board for its review and approval, prior to their release to customers or clients, any scannable and/or electronically processed substitute tax forms or any products that produce these forms;
3. When notified by the Franchise Tax Board, promptly correct errors in our company's scannable and/or substitute tax forms and substantiate to the Franchise Tax Board that our company has corrected the errors and notified customers or clients of the corrections;
4. Notify customers or clients of the minimum computer hardware requirements, including printers, printer fonts, font cartridges, etc., necessary to produce our company's scannable and/or substitute tax forms that were approved by the Franchise Tax Board; and
5. Identify to the Franchise Tax Board all scannable and/or substitute tax forms and tax software programs using our company's identification code.

Our company also specifically authorizes the Franchise Tax Board to include the name of our company in various public information material designed to inform tax practitioners and the public about vendors who have agreed, complied, or failed to comply with the Franchise Tax Board's policies, procedures, guidelines and specifications.

Authorized representative's name	Company identification code	Date
Signature by:	Street address	
Title	City, state, ZIP code	
Forms contact name	Telephone number ()	FAX number ()
Forms contact Email address	Telephone number for public distribution ()	